RESOURCE AND PATIENT MANAGEMENT SYSTEM

Clinical Reporting System (CRS)
For FY 2005 Clinical Indicators
(BGP)

Patch 1 Addendum

Version 5.0 Patch 1
January 2005

Office of Information Technology
Albuquerque, New Mexico

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1.0   Introduction

Please review these changes and add a copy of them to any printed documentation your site may be using for Clinical Reporting System v5.0. These changes will be integrated into future versions of the software and user manuals and will no longer be considered an addendum at the time of the next release.

Patch 1 of Clinical Reporting System version 5.0 contains the following changes:

- Added functionality requiring users to have a security key to have access to the System Setup menu to edit the site parameters.

- Added functionality requiring users to have a security key to select/edit site-defined taxonomies.

- Added functionality requiring users to have a security key to run patient lists for any report.

- Per the Diabetes Program, revised numerator for GPRA indicator for Diabetes: Nephropathy Assessment to patients with positive urine protein test or, if urine protein test is negative, any microalbuminuria test, regardless of result, during the Report period. (previously required one of these tests and an Estimated GFR test).

- Added separate report option (OTH, GPU (GPRA Performance Report)) that enables users to run the National GPRA report for any report end date or ending on a pre-defined quarter (e.g. September 30, December 31). Users will also be able to choose the baseline year and patient population and export the report to the Area Office for aggregation.

- Enabled users to select report Current Report Period date range when running National GPRA patient lists. Users may select any report end date or an end date that ends on a pre-defined quarter (e.g. December 31).

- Added "Area Current" column to the Area Aggregate National GPRA report, Clinical Detail Section. This column displays the Area Aggregate indicator rates for the Current Report Period, so a comparison can easily be made between individual site and Area performance.

- Added separate Area Office report option (AO, GPUA (Run AREA GPRA Performance Report)) that enables Area Office users to run an Area Aggregate GPRA Performance report.

2.0   Patch 1

Patch 1 of Clinical Reporting System version 5.0 contains the following key changes:

- Added functionality requiring users to have a security key to have access to the System Setup menu to edit the site parameters. (section 2.1)

- Added functionality requiring users to have a security key to select/edit site-defined taxonomies. (section 2.2)

- Added functionality requiring users to have a security key to run patient lists for any report. (section 2.3)

- Per the Diabetes Program, revised numerator for GPRA indicator for Diabetes: Nephropathy Assessment to patients with positive urine protein test or, if urine protein test is negative, any microalbuminuria test, regardless of result, during the Report period. (previously required one of these tests and an Estimated GFR test). (section 2.4)

- Added separate report option (OTH, GPU (GPRA Performance Report)) that enables users to run the National GPRA report for any report end date or ending on a pre-defined quarter (e.g. September 30, December 31). Users will also be able to choose the baseline year and patient population and export the report to the Area Office for aggregation. (section 2.5)

- Enabled users to select report Current Report Period date range when running National GPRA patient lists. Users may select any report end date or an end date that ends on a pre-defined quarter (e.g. December 31). (section 2.7)

- Added "Area Current" column to the Area Aggregate National GPRA report, Clinical Detail Section. This column displays the Area Aggregate indicator rates for the Current Report Period, so a comparison can easily be made between individual site and Area performance. (section 2.8)

- Added separate Area Office report option (AO, GPUA (Run AREA GPRA Performance Report)) that enables Area Office users to run an Area Aggregate GPRA Performance report. (section 2.9)

2.1   Added Security Key to Access and Edit Site Parameters

In order to access and edit the SP Site Parameters menu option from the Setup Menu (see User Manual section 4.0, Figure 4-3), users must now have a security key, which is assigned by the Site Manager. Users without this security key will not have this menu option displayed on the Setup Menu.

2.2   Added Security Key to Select and Edit Site-Defined Taxonomies

In order to select/edit the site-defined taxonomies (see User Manual section 4.3.4), users must now have a security key, which is assigned by the Site Manager. Users with this security key will select/edit a taxonomy as defined in User Manual section

4.3.4. Users without this security key will only be able to display the members in a site-defined taxonomy, but not edit them, as described below.

1. Type TAX at the "Select System Setup Option:" prompt from the Setup Menu (see User Manual, section 4.0, Figure 4-3).

2. A list of the site-defined taxonomies displays (Figure 2-1).

```
CRS TAXONOMY UPDATE          Dec 13, 2004 11:40:03        Page:   1 of   1
TAXONOMIES TO SUPPORT CRS REPORTING
* Update Taxonomies

1)   DM AUDIT CREATININE TAX            CREATININE Lab tests
2)   DM AUDIT HGB A1C TAX               HGB A1C Lab Tests
3)   DM AUDIT LIPID PROFILE TAX         Lipid Profile Lab Tests
4)   DM AUDIT LDL CHOLESTEROL TAX       LDL Cholesterol Lab Tests
5)   DM AUDIT TRIGLYCERIDE TAX          Triglyceride Lab Tests
6)   DM AUDIT HDL TAX                   HDL Lab Tests
7)   DM AUDIT URINE PROTEIN TAX         Urine Protein Lab Tests
8)   DM AUDIT MICROALBUMINURIA TAX      Microalbuminuia Lab Tests
9)   DM AUDIT CHOLESTEROL TAX           Cholesterol Tests
10)  BGP GPRA ESTIMATED GFR TAX         Estimated GFR Tests
11)  BGP PAP SMEAR TAX                  Pap Smear tests
12)  BGP GPRA FOB TESTS                 Fecal Occult Blood Tests
13)  BGP HIV TEST TAX                   HIV lab tests
14)  BGP CD4 TAX
15)  BGP HIV VIRAL LOAD TAX
16)  BGP CHLAMYDIA TESTS TAX            Chlamydia lab taxonomy
          Enter ?? for more actions
S    Select Taxonomy     D    Display a Taxonomy   Q    Quit
Select Action:+//
```
Figure 2-1: Site-defined Lab Taxonomies List

3. To display a taxonomy, type D (Display Taxonomy) at the "Select Action:" prompt.

4. Type the number of the taxonomy you want to display. In the example below, item 7 (DM AUDIT URINE PROTEIN TAX) was entered.

5. The taxonomy and its associated members are displayed, as shown in Figure 2-2.

6. Press the Enter key to return to the taxonomy list.

```
DM AUDIT URINE PROTEIN TAX

Tests currently defined in this taxonomy:
     PROTEIN (URINE)
     PROTEIN URINE (SO)


Press enter to continue:
```
Figure 2-2: Displaying Taxonomies (steps 3-5)

2.3   Added Security Key to Run Patient Lists for All Reports

In order to run patient lists for any report, users must now have a security key, which is assigned by the Site Manager. Users with this security key will be able to run patient lists for the National GPRA report (see User Manual section 6.4), Selected Indicators report (see User Manual section 6.5), and HEDIS Performance Report (see User Manual section 6.6). Users without this security key will not have the LST National GPRA Report Patient List menu option displayed on the National GPRA Reports menu (see User Manual section 6.2, Figure 6-4) and will not be prompted to run patient lists in the Selected Indicators and HEDIS Performance reports.

2.4   Revised GPRA Indicator for Diabetes: Nephropathy Assessment

Per the Diabetes Program, the numerator for the GPRA Indicator for Diabetes: Nephropathy Assessment has been revised as shown below. The previous version required both a urine protein/any microalbuminuria AND an estimated GFR.

> GPRA Numerator: Patients with positive urine protein test or, if urine protein test is negative, any microalbuminuria test, regardless of result, during the Report period.

A separate numerator requiring both tests will also be included on the National GPRA, GPRA Performance, and Selected Indicators reports; however, it is not the GPRA numerator.

2.5   Added New GPRA Performance Report

2.5.1   Purpose

This report is included on the Other National Reports menu. The GPRA Performance report (GPU) includes the same indicators included in the National GPRA report (see User Manual section 5.1.1). However, unlike the National GPRA report, users select ALL report parameters (i.e. report end date, report year, baseline year, patient population, and community taxonomy) for this report. For the report end date, users may select from pre-defined quarters, such as September 30, December 31, or users may enter any end date, such as November 14.

The GPRA Performance report can be exported to the Area Office by the site for aggregation into an Area-wide report.

Patient lists may not be run with this report; however, patient lists may be run for the National GPRA report (see User Manual section 5.1.4.1 for additional information), which contains the same indicators as the GPRA Performance report.

2.6   Running the Report

1. To access the CRS 2005 Main Menu, type CI05 at the "Select IHS Clinical Reporting System (CRS) Option:" prompt from the CRS Main Menu (Figure 2-3).

```
             *******************************************************
             **                 IHS/RPMS CRS 2005                **
             **              Clinical Reporting System            **
             *******************************************************
                               Version 5.0

                                 DEMO SITE

   CI05   CRS 2005 ...
   GP04   GPRA+ FY04 ...
   GP03   GPRA+ FY03 ...
   GP02   GPRA+ FY02 ...

Select IHS Clinical Reporting System (CRS) Option: CI05   CRS 2005
```
Figure 2-3: CRS Main Menu

2. The CRS 2005 main menu will be displayed (Figure 2-4). The AO Area Options generally will only be displayed for Area Office staff with appropriate security keys assigned.

```
             *******************************************************
             **                 IHS/RPMS CRS 2005                **
             **              Clinical Reporting System            **
             *******************************************************
                               Version 5.0

                                 DEMO SITE

   RPT     Reports ...
   SET     System Setup ...
   AO      Area Options ...

Select CRS 2005 Option: RPT   Reports
```
Figure 2-4: CRS 2005 Main Menu

3. To access the CRS Reports Menu, type RPT at the "Select CRS 2005 Option:" prompt.

4. The CRS 2005 Reports menu is displayed (Figure 2-5). To access the sub-menu for the other national reports, type OTH at the "Select Reports Option:" prompt.

```
                        **************************
                        **   IHS/RPMS CRS 2005  **
                        **     Reports Menu      **
                        **************************
                                Version 5.0

                                 DEMO SITE

   NTL    National GPRA Reports ...
   LOC    Reports for Local Use: IHS Clinical Indicators ...
   OTH    Other National Reports ...

Select Reports Option: OTH  Other National Reports
```
Figure 2-5: CRS 2005 Reports Menu

5. The Other National Reports menu displays (Figure 2-6). Type GPU at the "Select Other National Reports Option:" prompt.

```
                    ********************************
                    **      IHS/RPMS CRS 2005      **
                    **   Other National Reports   **
                    ********************************
                                Version 5.0

                                 DEMO SITE

   GPU    GPRA Performance Report
   HED    HEDIS Performance Report

Select Other National Reports Option: GPU  GPRA Performance Report
```
Figure 2-6: Other National Reports Menu

6. Information about the GPRA Performance report will appear and the site-defined lab taxonomies needed to run the report will be checked (Figure 2-7).

```
        IHS GPRA Performance Report for a User Selected Date Range

This will produce a National GPRA report for a year period you specify.

You will be asked to provide: 1) the reporting period, 2) the baseline
period to compare data to, 3) the Community taxonomy and 4) the patient
population (i.e. AI/AN only, non AI/AN, or both) to determine which
patients will be included.

You can choose to export this data to the Area office.  If you
answer yes at the export prompt, a report will be produced in export format
for the Area Office to use in Area aggregated data.  Depending on site specific
configuration, the export file will either be automatically transmitted
directly to the Area or the site will have to send the file manually.

Checking for Taxonomies to support the National GPRA Report...

All taxonomies are present.

End of taxonomy check.  PRESS ENTER:
```
Figure 2-7: Running the GPRA Performance Report, Report Description Display and Taxonomy Check

7. Select the date range for the report (see Figure 2-8) by following steps a or b below.

```
     Select one of the following:

          1             January 1 - December 31
          2             April 1 - March 31
          3             July 1 - June 30
          4             October 1 - September 30
          5             User-Defined Report Period

Enter the date range for your report:
```
Figure 2-8: Running the GPRA Performance Report, Selecting Report Date Range

    a. To select a pre-defined period (e.g. January 1 – December 31):

        i. Select one of the first four options.

        ii. Enter the calendar year of the report end date.

    b. To enter your own report end date:

        i. Select option 5, User-Defined Report Period.

        ii. Enter the end date of the report in MM/DD/CCYY format (e.g. 11/30/2004).

8. Type the baseline year at the "Enter Year:" prompt.

9. Type the number corresponding to the Beneficiary population you want to review. This allows you to specify one of three options: American Indian and Alaska Natives (AI/AN) only, patients who are not AI/AN, or your entire population.

```
Select one of the following:

          1             Indian/Alaskan Native (Classification 01)
          2             Not Indian Alaskan/Native (Not Classification 01)
          3             All (both Indian/Alaskan Natives and Non 01)

Select Beneficiary Population to include in this report: 1// 1  Indian/Alaskan Native
(Classification 01)
```
Figure 2-9: Running the GPRA Performance Report, Selecting Beneficiary Population

10. Type Y or N at the "Do you wish to export this data to Area?" prompt. You should only choose this option when you are ready to send final data to your Area Office.

11. A summary of the GPRA Performance report displays (Figure 2-10).

```
              SUMMARY OF IHS GPRA PERFORMANCE REPORT TO BE GENERATED
                              CRS 2005, Version 5.0

The date ranges for this report are:
     Report Period:          Dec 01, 2003 to Nov 30, 2004
     Previous Year Period:   Dec 01, 2002 to Nov 30, 2003
     Baseline Period:        Dec 01, 1999 to Nov 30, 2000

The COMMUNITY Taxonomy to be used is: BETA TEST COMMUNITIES
The Beneficiary Population is: Indian/Alaskan Native (Classification 01)
The HOME location is: HOME 808789

Please choose an output type.  For an explanation of the delimited
file please see the user manual.


     Select one of the following:

          P          Print Report on Printer or Screen
          D          Create Delimited output file (for use in Excel)
          B          Both a Printed Report and Delimited File

Select an Output Option: P//
```
Figure 2-10: Summary Screen for GPRA Performance Report

> 12. Follow step 8 in User Manual section 6.3 to determine the output (e.g., print to screen, delimited file, etc.) to finish running the report.

2.7   Enabled Users to Select Current Report Period Date Range When Running National GPRA Patient Lists

In order to be able to run patient lists to research and/or validate the quarterly GPRA report data (i.e. GPRA Performance reports), users may now select the Current Report Period date range when running the National GPRA Patient Lists. To do this, follow User Manual steps 1-13 in section 6.4, then follow step 7 of section 5 in this addendum. NOTE: Users may not change the baseline year, which is hard-coded to "2000" or the patient population, which is hard-coded to "AI/AN Only."

2.8   Revised Clinical Detail Section, Area Aggregate National GPRA Report

The Clinical Performance Detail section of the Area Aggregate National GPRA report has been revised to include an "Area Current" column, which will list the Area Aggregate values for the Current Report Period for each indicator included in this report. This will allow users to easily compare the performance of each site within the Area with the overall Area performance for each indicator. A sample of the revised Clinical Performance Detail section of the report is shown in Figure 2-11 below.

```
ADAM                              Mar 14, 2005                         Page 1
      *** IHS 2005 National GPRA Clinical Performance Indicator Report ***
                              AREA AGGREGATE
                 Report Period: Jul 01, 2004 to Jun 30, 2005
            Previous Year Period:  Jul 01, 2003 to Jun 30, 2004
             Baseline Period:  Jul 01, 1999 to Jun 30, 2000
-----------------------------------------------------------------------------
                         CLINICAL PERFORMANCE DETAIL
                         Site      Site       Site     Area     National   2010
                         Current   Previous   Baseline Current  2004       GOAL
-----------------------------------------------------------------------------

DIABETES GROUP

*Diabetes DX Ever                                        10.7%    10.0%     TBD
    999999 FACILITY A        10.0%      9.5%       8.4%
    999999 FACILITY B        20.4%     18.9%      16.2%
    999999 FACILITY C        15.3%     17.6%      16.8%

*Documented HbA1c                                        80.5%    76.1%     50%
    999999 FACILITY A        83.1%     73.5%      84.1%
    999999 FACILITY B        76.5%     70.5%      69.9%
    999999 FACILITY C        85.2%     84.8%      82.3%

Poor Glycemic Control >9.5                               20.4%    16.7%     TBD
    999999 FACILITY A        24.7%     15.0%      25.7%
    999999 FACILITY B        17.9%     16.9%      14.2%
    999999 FACILITY C        12.5%     14.9%      16.7%

(* = Not GPRA indicator for FY 2005)
```

Figure 2-11: Sample Area National GPRA Report Clinical Performance Detail section

2.9   Added New Area Aggregate GPRA Performance Report

The Area Office GPRA Performance Report option (GPUA) is used by the Area to produce an Area-wide GPRA Performance report. This report aggregates all data files received to date from facilities and reports the total Area-wide numbers.

The process for uploading data files from facilities for this report is the same as defined in User Manual section 7.1.

The GPRA Performance report is different from the National GPRA report as it can be run for different types of user populations: American Indian and Alaska Natives (AI/AN) only, non AI/AN, or both. It can also be run for different date ranges, whereas the National GPRA report uses pre-defined date ranges. However, the indicators included in this report are exactly the same as those included in the National GPRA report. Patient lists are NOT included in the Area Aggregate report.

> **NOTE:** To run the Area Aggregate GPRA Performance report, the data uploaded from the facilities must have matching date ranges, calendar year end dates, baseline year, and beneficiary (patient) population.

1. Type **GPUA** at the "Select Area Options Option:" prompt on the Area Office Options menu (Figure 2-12).

```
                       ***************************
                       **    IHS/RPMS CRS 2005    **
                       **   Area Office Options   **
                       ***************************
                              Version 5.0

                               DEMO SITE


   UPL    Upload Report Files from Site
   AGP    Run AREA National GPRA Report
   GPUA   Run AREA GPRA Performance Report
   AHED   Run Area HEDIS Report
   LSTF   List files in a directory

Select Area Options Option: GPUA Run AREA GPRA Performance Report
```
Figure 2-12: Opening the Area GPRA Performance Report from the Area Office Options Menu

2. Select the date range for the report (Figure 2-13) by following steps a or b below.

```
      Select one of the following:

           1           January 1 - December 31
           2           April 1 - March 31
           3           July 1 – June 30
           4           October 1 - September 30
           5           User-Defined Report Period

Enter the date range for your report:  4  October 1 – September 30
```
Figure 2-13: Running the Area GPRA Performance Report, Selecting Report Date Range

 a. To select a pre-defined period (e.g. January 1 – December 31):

  i. Select one of the first four options.

  ii. Enter the calendar year of the report end date.

 b. To enter your own report end date:

  i. Select option 5, User-Defined Report Period.

  ii. Enter the end date of the report in MM/DD/CCYY format (e.g. 11/30/2004).

3. Enter the baseline year. The screen will display the date ranges that you have selected for the report, including Report (Current), Previous Year and Baseline (Figure 2-14).

```
    [AREA] Area Aggregate GPRA Performance Report with user defined date range

     Select one of the following:

          1            January 1 - December 31
          2            April 1 - March 31
          3            July 1 - June 30
          4            October 1 - September 30
          5            User-Defined Report Period

Enter the date range for your report: 4  October 1 - September 30

Enter the Calendar Year for the report END date.  Use a 4 digit
year, e.g. 2004
Enter Year:  2004  (2004)

Enter the Baseline Year to compare data to.
Use a 4 digit year, e.g. 1999, 2000
Enter Year (e.g. 2000):  2001  (2001)

The date ranges for this report are:
    Reporting Period:         Oct 01, 2003 to Sep 30, 2004
    Previous Year Period:     Oct 01, 2002 to Sep 30, 2003
    Baseline Period:          Oct 01, 2000 to Sep 30, 2001
```
Figure 2-14: Running the Area GPRA Performance Report, Selecting the Report Time Period

4. Type the number corresponding to the Beneficiary (patient) population to be included in the report (Figure 2-15).

```
    Select one of the following:

          1            Indian/Alaskan Native (Classification 01)
          2            Not Indian Alaskan/Native (Not Classification 01)
          3            All (both Indian/Alaskan Natives and Non 01)

Select Beneficiary Population to include in this report: 1//   Indian/Alaskan Native
(Classification 01)
```
Figure 2-15: Running the Area GPRA Performance Report, Selecting Report Population-Type

5. Follow User Manual section 7.2.1 (Run Area National GPRA Report) steps 3 through 7 to select report type and output.

3.0   Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT Help Desk by:

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